New Client Interview Checklist

Dear client,

To better assess your accounting needs, please complete the form below.

Client Information

- Date: ___________
- Owner Name:____
- Company Name:____
- Address:____
- City / State / Zip: ____
- Phone:_______________________ Email :_________________________

Business Information

- Mac or PC ____
- How many businesses? ____
- How long have you been in business? ____
- Type of Business: Service ____________ Retail________ Wholesale____________________
- Sole Prop ☐ Partnership ☐ S. Corp ☐ C. Corp ☐ LLC ☐ LLP ☐
- What was the last year you filed taxes for? ____
- Need a CPA? ____
- If necessary, may we contact your CPA? ____
- CPA Name: _______________________Phone:_____________________________________
- Do you currently have a bookkeeping service? ______________________________________
- What do you need from your bookkeeping system? ___________________________________
- How much time do you spend doing bookkeeping related tasks each month? _____________
- Will you use Quick Books for tracking inventory? ____________________________________
- Do you pay 1099 vendors? ☐ How many? ____
- Do you need budget reports?☐ Job cost reports? ___________________________________
- Primarily, what do you intend to use Quick Books for? ________________________________
- Number of checking accounts:____
- Number of credit card accounts:____
- Approximate number of transactions per month:____________________________________
- Do you charge sales tax: Yes ☐ No ☐ If yes, what City __________________________
- Have you applied for a Sales Tax License? ____

Owner: Jacque Wagner
All is Accounted For
303-746-4573
Updated 6/19/2015

Payroll

- Are you currently using or intend to use Quick Books for payroll purposes? ________________
- Number of employees: ____
- State ID# ____
- Withholding ID# ____
- Unemployment ID# ____
- EFT PS (Electronic Federal Tax Payment System) or Social Security #____________________

Notes:____

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